

# **PEDS Data Entry Training Individual and Family Direct Service Data**

Statewide Data Collection  
and Evaluation of First 5  
California Funded  
Programs



# Individual and Family Direct Service Data

## Goals of Training

- To define “direct service data for individual and family.”
- To learn how to enter individual direct service data into PEDS.
- To learn how to copy service detail information to a family member’s record.
- To learn how to edit and delete individual and family direct service data from PEDS.

# Individual and Family Direct Service Data Definition

Information about intensive services delivered to individual children ages 0-5, their parents/guardians, and other family members.

The Direct Services data collection tool for individuals and families collects information on:

- **When** services were delivered.
- **What** and **how** activities were provided (modalities).
- **Who** received the services (participants).

# How do I enter individual direct service data into PEDS?

**FIRST5 CALIFORNIA**  
Statewide Data Collection and Evaluation

**Proposition 10**  
Evaluation Data System

**Main Menu**

[Data Entry](#) [Reports](#) [Data Collection](#) [Narratives](#) [Program Setup](#) [User Type Selection](#)

Please select a Reporting Period: 2005-2006 Fiscal Year

**Activities (Aggregate Data)**  
View Data Within Date Range (mm/dd/yyyy):  
Start Date: 07/01/2005 End Date: 04/04/2006  
Enter/View Data for Strategy:  
[Direct Service](#) [Provider Capacity Building](#)  
[Nonduplicated Counts](#) [Infrastructure Investments](#)  
[Community Strengthening](#) [Systems Change Activities](#)

**Achievement Milestones**  
[Enter/View Data](#)

**Funds Spent**  
[By Strategy](#)

**(Individual Data)**  
Add a New Core Participant:  
[Core Prenatal Parent](#) [Core Child 0-5 and Guardian](#)  
Add a New Non-Core Participant (INC):  
[Non-Core Guardian](#) [Non-Core Child 0-5](#)  
Search For Participant:  
Last Name:  Gender:   
Type:  Status: Active   
[Search](#)

**Group Service Details**  
View Data Within Date Range (mm/dd/yyyy):  
Start Date: 07/01/2005 End Date: 04/04/2006  
[Enter/View Data](#) [Design Groups](#)

Click **Search** to advance to individual participant browser.

User: sanders.mary (0 login attempts since 4/3/2006 11:16:09 AM)  
User Type: Funded Program User  
Funded Program: Mayberry Resource Center

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# How do I enter individual direct service data into PEDS?

**FIRST5 CALIFORNIA**  
Statewide Data Collection and Evaluation

HELP! Client Report  
Participant Info:  
**Intake or Follow-up Due**  
Intake/Follow-up  
Consent/AB-99  
Demographics  
Address  
Case Notes

Services:  
Service Info  
Service Details

Add New Participant:  
Add New

| Last Name    | First Name | DOB        | Gen. | Part.    | Type     | Status | ID   |
|--------------|------------|------------|------|----------|----------|--------|------|
| Randall      | John       | 05/05/2003 | M    | Child    | Non-Core | Active | 2227 |
| Richardson   | Remmie     | 07/05/1980 | F    | Guardian | Core     | Active | 2155 |
| Richardson   | Susie      | 07/05/2004 | F    | Child    | Core     | Active | 2156 |
| Rothenberger | Helen      | 08/01/1975 | F    | Guardian | Core     | Active | 2152 |
| Rothenberger | Betty      | 06/09/1999 | F    | Child    | Core     | Active | 2277 |

Case Information  
Current Telephone 555-555-5555  
Next Follow-up Due 12/21/2004  
Middle Name Marie  
Mother's First Name Remmie  
Place of Birth Mariposa

Family Information  
Select family member.  
Richardson, Remmie (Guardian)  
Add family member to selected participant.  
Select  
Add  
Menu

Done Trusted sites

Select the participant in participant browser.

Click Service Details.

# How do I enter individual direct service data into PEDS?

**FIRST5 CALIFORNIA** Statewide Data Collection and Evaluation

Richardson, Susie

Menu Browser Family Members

Participant Info:  
**Intake or Follow-up Due**

Intake/Follow-up  
Consent/AB-99  
Demographics  
Address  
Case Notes

Services:  
Service Info  
Service Details

Add New Participant:  
Add New

### Service Details

Modality:  Start Date: 03/21/2006 End Date: 04/04/2006 Go

| Modality         | Date/Date Range |
|------------------|-----------------|
| No Records Found |                 |

Modality Information | Activity Information | Case Notes

**Modality Information**

Modality: 02 - Home visit

**Date/Duration Information**

Date: 01/15/2006 Or Start Date: End Date: (mm/dd/yyyy) (mm/dd/yyyy) (mm/dd/yyyy)

Duration/Amount: Type: Duration/Amount: Occurrences/Events (#)

**Location Information**

Activity Location:

Copy Service Details: ☐ Richardson, Rennie (Guardian)

Refresh Next

Click Next.

# How do I copy service details to family members into PEDS?

**FIRST5 CALIFORNIA** Statewide Data Collection and Evaluation

Richardson, Susie

Menu Browser Family Members

Services:

**Service Info**

**Service Details**

Add New Participant:

**Add New**

**Modality Information**

Modality: Visit

**Date/Duration Information**

Date: 01/15/2001 (mm/dd/yyyy)

Start Date: (mm/dd/yyyy)

End Date: (mm/dd/yyyy)

Duration/Amount: Hours

Duration/Amount: 1

Occurrences/Events: 1

**Location Information**

Activity Location: Mayberry Resource Center

Copy Service Details: ☒ Richardson, Rennie (Guardian)

**Refresh** **Next**

Done

Trusted sites

Service detail information will be automatically copied to the records of all family members selected.

If family members received the same service, select the **Copy Service Details** checkbox (optional).

Click Next.

# How do I enter individual direct service data into PEDS?

**FIRST5 CALIFORNIA** Statewide Data Collection and Evaluation

Richardson, Susie DOB:07/05/2004

Menu Browser Family Members Client Report

**Service Details**

Modality: [Dropdown]

Modality

No Records Found

Enter the activity Information.

Modality Information Activity Information Case Notes

Modality: 02 - Home visit

Activities: ☐ Show All ☒ Focused Listing

**Family Support, Education, and Services**

- ☐ Community resource and referral (to health and social services)
- ☒ Mental health assessment or services
  - ☐ Parent-child intervention
- ☐ Enrollment/assistance with TANF, WIC, Food Stamps, or food program
- ☒ Provision of food, clothes, emergency funds, housing, or other basic needs
- ☐ Parenting education (includes programs for teens)

Click Next.

Done Trusted sites



# How do I enter individual direct service data into PEDS?

The screenshot shows the FIRST5 CALIFORNIA web application. At the top, the participant's name "Richardson, Susie" and date of birth "DOB:07/05/2004" are displayed. A navigation menu includes "Menu", "Browser", "Family Members", and a "Client Report" link. The left sidebar contains a "Participant Info:" section with a red "Intake or Follow-up Due" status and buttons for "Intake/Follow-up", "Consent/AB-99", "Demographics", "Address", and "Case Notes". Below this is a "Services:" section with "Service Info" and "Service Details" buttons, and an "Add New Participant:" section with an "Add New" button. The main content area is titled "Service Details" and includes a "Modality:" dropdown, "Start Date:" (03/21/2006), "End Date:" (04/04/2006), and a "Go" button. A table with columns "Modality" and "Date/Date Range" shows "No Records Found". Below the table are tabs for "Modality Information", "Activity Information", and "Case Notes". The "Case Notes" tab is active, showing a text area with the note "Susie has been improving with each visit". A light blue callout bubble points to this text area with the text "Enter Notes (optional)". At the bottom of the form are "Refresh", "Previous", and "Save" buttons. A second light blue callout bubble points to the "Save" button with the text "Click Save." The browser's status bar at the bottom indicates "Trusted sites".

**FIRST5 CALIFORNIA** Statewide Data Collection and Evaluation

Richardson, Susie DOB:07/05/2004

Menu Browser Family Members [dropdown] Client Report

**Service Details**

Modality: [dropdown] Start Date: 03/21/2006 End Date: 04/04/2006 Go

| Modality         | Date/Date Range |
|------------------|-----------------|
| No Records Found |                 |

Modality Information Activity Information Case Notes

**Case Notes**

Notes: Susie has been improving with each visit

Refresh Previous Save

Enter Notes (optional).

Click Save.

# How do I edit individual direct service data in PEDS?

The screenshot shows the FIRST 5 PEDS system interface for Richardson, Susie. The interface includes a left sidebar with navigation buttons: Intake/Follow-up, Consent/AB-99, Demographics, Address, Case Notes, Service Info, and Service Details. The main area displays a table of activities with columns for Modality, Start Date, and End Date. A callout points to the 'Go' button next to the Start Date field, indicating how to find activities from an earlier reporting period. Another callout points to the 'Modality' dropdown menu, indicating where to make changes to Modality Information. A third callout points to the 'Next' button, indicating how to save changes and proceed.

**Callout 1:** Select the entry you wish to edit.

**Callout 2:** To find activities from an earlier reporting period, change the **Start Date** and click **Go**.

**Callout 3:** Make changes to Modality Information.

**Callout 4:** Make changes and click **Next**.

| Modality        | Start Date | End Date |
|-----------------|------------|----------|
| Home visit      | 01/15/2006 |          |
| Class/workshop  | 12/01/2005 |          |
| Case management | 09/01/2005 |          |

**Modality Information**

Modality: [Dropdown]

**Date/Duration Information**

Date (mm/dd/yyyy) [Field] Or Start Date (mm/dd/yyyy) [Field] End Date (mm/dd/yyyy) [Field]

Duration/Amount Type: [Dropdown] Avg. [Field] Occurrences/Events (#) [Field]

**Location Information**

Activity Location: [Dropdown]

Copy Service Details: ☐ Richardson, Rennie (Guardian)

**Buttons:** Refresh, Next

# How do I edit individual direct service data in PEDS?

**FIRST5 CALIFORNIA** Statewide Data Collection and Evaluation

Richardson, Susie

Menu Browser Family Members

**Service Details**

Modality: [Dropdown] Start Date: 07/01/2005 End Date: 04/04/2006 Go

| Modality        | Date/Date Range         |
|-----------------|-------------------------|
| Home visit      | 07/01/2005 - 04/04/2006 |
| Class/workshop  | 12/01/2005 - 12/31/2005 |
| Case management | 09/01/2005 - 09/30/2005 |

**Modality Information** **Activity Information** Case Notes

Modality: 02 - Home visit

Activities: ☐ Show All ☒ Focused Listing

**Family Support, Education, and Services**

- ☐ Community resource and referral (to health and social services)
- ☒ Mental health assessment or services
  - ☒ Parent-child intervention
- ☒ Enrollment/assistance with TANF, WIC, Food Stamps, or food program
- ☐ Provision of food, clothes, emergency funds, housing, or other basic needs
- ☒ Parenting education (includes programs for teens)

Click Next.

# How do I edit individual direct service data in PEDS?

**FIRST5 CALIFORNIA**  
Statewide Data Collection and Evaluation

Richardson, Susie DOB: 07/05/2004

Menu Browser Family Members

**Service Details**

Modality:  Start Date:

| Modality        |                         |
|-----------------|-------------------------|
| Home visit      | 01/15/2006              |
| Class/workshop  | 12/01/2005 - 12/31/2005 |
| Case management | 09/01/2005 - 09/30/2005 |

Modality Information Activity Information Case Notes

**Case Notes**

Susie has been improving with each visit

Notes:

Delete Refresh Previous **Save**

Click **Save**.

# How do I delete individual direct service data from PEDS?

**FIRST5 CALIFORNIA** Statewide Data Collection and Evaluation

Participant Info: **Richardson, Susie** DOB: 07/05/2004

Menu Browser Family Members

**Service Details**

Modality: [Dropdown] Start Date: 07/01/2005 End Date: 04/04/2006 Go

| Modality        | Date/Date Range         |
|-----------------|-------------------------|
| Home visit      | 01/15/2006              |
| Class/workshop  | 12/01/2005 - 12/31/2005 |
| Case management | 09/01/2005 - 09/30/2005 |

Modality Info: [Dropdown]

Date/Dur: [Dropdown] (mm/DD/YYYY)

Location Information: Activity Location: Mayberry Resource Center

Copy Service Details: ☒ Richardson, Rennie (Guardian)

**Microsoft Internet Explorer**

Service Detail record will be deleted from all linked participants.

OK

**Delete** **Refresh** **Next**

1. Select the entry you wish to delete.

2. Click **Delete**.

3. Click **OK**.

# How do I delete individual direct service data from PEDS?

**FIRST 5 CALIFORNIA** Statewide Data Collection and Evaluation

Richardson, Susie DOB:07/05/2004

Menu Browser Family Members Client Report

Participant Info:  
**Intake or Follow-up Due**

Intake/Follow-up  
Consent/AB-99  
Demographics  
Address  
Case Notes

Services:  
Service Info  
Service Details

Add New Participant:  
Add New

**Service Details**

Modality: Start Date: 07/01/2005 End Date: 04/04/2006 Go

| Modality        | Date/Date Range         |
|-----------------|-------------------------|
| Home visit      | 01/15/2006              |
| Class/workshop  | 12/01/2005 - 12/31/2005 |
| Case management | 07/01/2005 - 09/30/2005 |

Modality: ? Are you sure you want to delete this record?  
OK Cancel

Click OK.

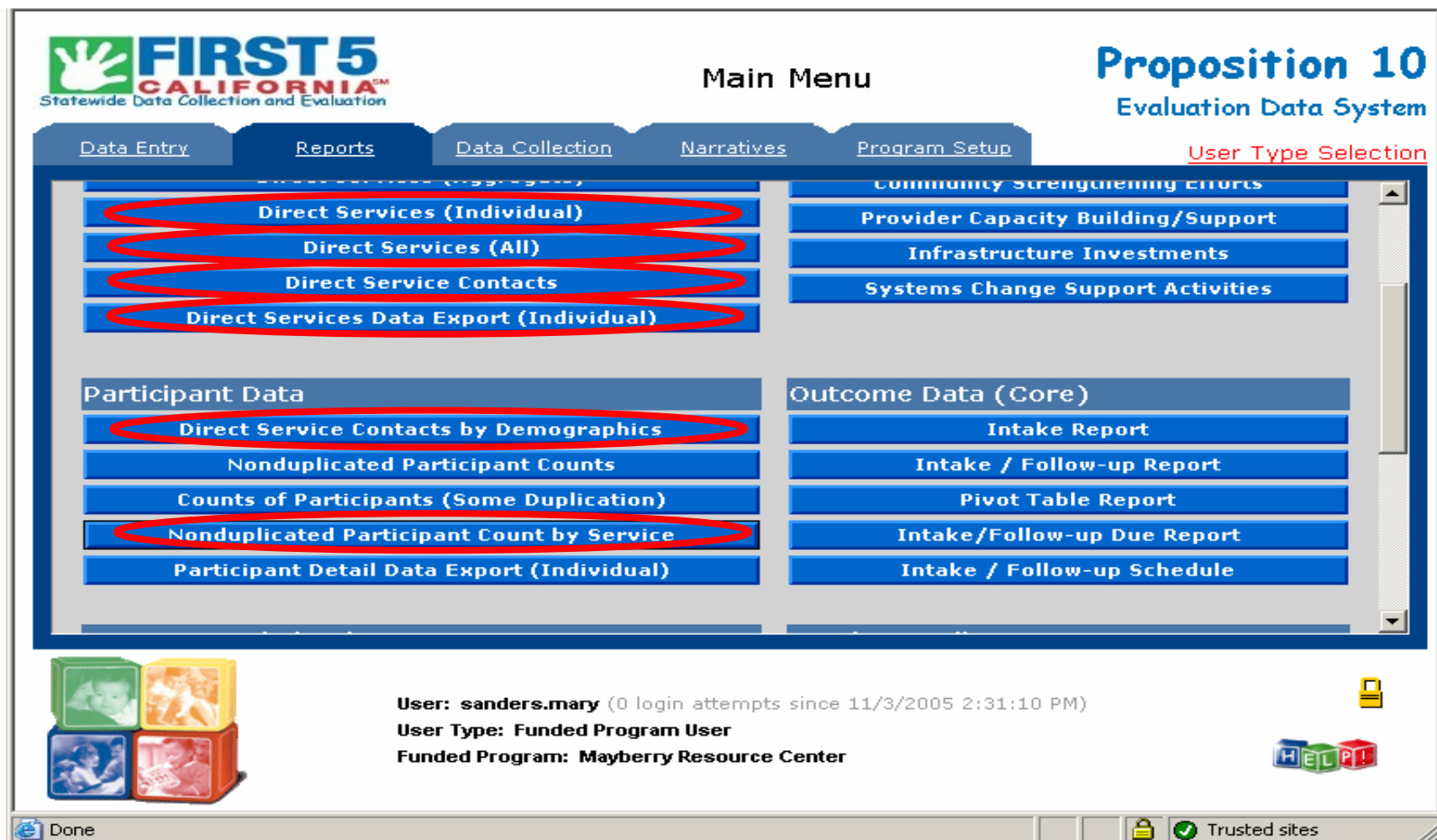
Duration/Amount Type: Hours Duration/Amount: 1 Occurrences/Events (#) 1

Location Information  
Activity Location: Mayberry Resource Center

Copy Service Details: ☒ Richardson, Rennie (Guardian)

Delete Refresh Next

# Individual and Family Direct Service Data Applicable Reports



The screenshot displays the 'Main Menu' of the 'Proposition 10 Evaluation Data System'. The interface includes a top navigation bar with tabs for 'Data Entry', 'Reports', 'Data Collection', 'Narratives', and 'Program Setup'. The 'Reports' tab is currently selected. Below the tabs, the menu is organized into two columns. The left column lists reports under 'Direct Services (Individual)' and 'Participant Data'. The right column lists reports under 'Community Strengthening Efforts' and 'Outcome Data (Core)'. Several reports are circled in red, indicating they are applicable for individual and family direct service data. At the bottom, user information is displayed, including the username 'sanders.mary', user type 'Funded Program User', and funded program 'Mayberry Resource Center'. A 'Done' button is visible in the bottom left corner, and a 'Trusted sites' status is shown in the bottom right corner.

**FIRST5 CALIFORNIA**  
Statewide Data Collection and Evaluation

**Main Menu**

**Proposition 10**  
Evaluation Data System

Data Entry Reports Data Collection Narratives Program Setup [User Type Selection](#)

**Direct Services (Individual)**  
Direct Services (All)  
Direct Service Contacts  
Direct Services Data Export (Individual)

**Participant Data**  
Direct Service Contacts by Demographics  
Nonduplicated Participant Counts  
Counts of Participants (Some Duplication)  
Nonduplicated Participant Count by Service  
Participant Detail Data Export (Individual)

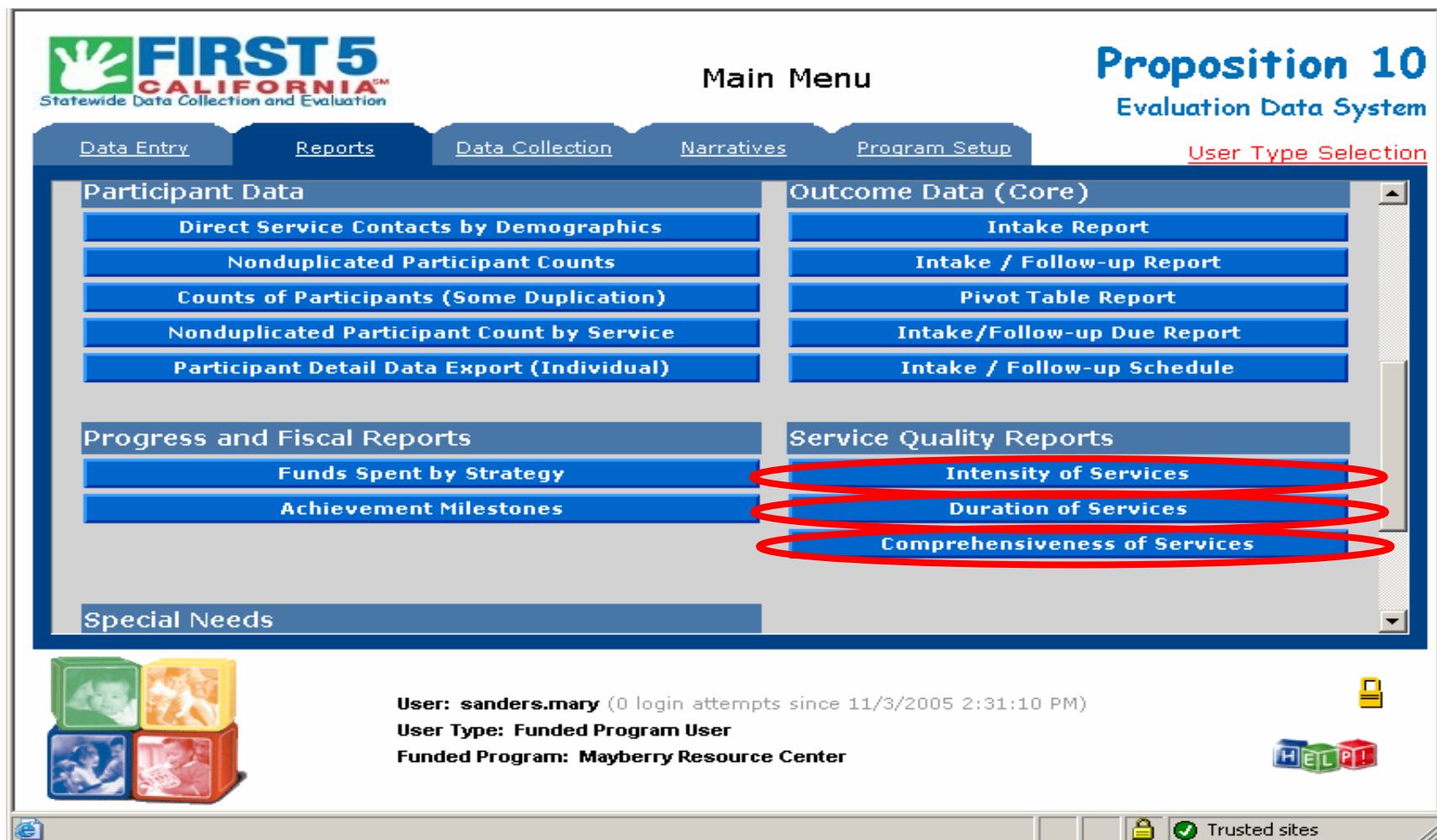
**Community Strengthening Efforts**  
Provider Capacity Building/Support  
Infrastructure Investments  
Systems Change Support Activities

**Outcome Data (Core)**  
Intake Report  
Intake / Follow-up Report  
Pivot Table Report  
Intake/Follow-up Due Report  
Intake / Follow-up Schedule

User: sanders.mary (0 login attempts since 11/3/2005 2:31:10 PM)  
User Type: Funded Program User  
Funded Program: Mayberry Resource Center

Done Trusted sites

# Individual and Family Direct Service Data Applicable Reports (continued)



The screenshot displays the 'Main Menu' of the 'Proposition 10 Evaluation Data System'. The interface includes a top navigation bar with tabs for 'Data Entry', 'Reports', 'Data Collection', 'Narratives', and 'Program Setup'. The 'Reports' tab is currently selected. Below the navigation bar, the menu is organized into several categories: 'Participant Data', 'Outcome Data (Core)', 'Progress and Fiscal Reports', 'Service Quality Reports', and 'Special Needs'. The 'Service Quality Reports' section contains three items: 'Intensity of Services', 'Duration of Services', and 'Comprehensiveness of Services', which are highlighted with red ovals. The bottom of the screen shows user information: 'User: sanders.mary (0 login attempts since 11/3/2005 2:31:10 PM)', 'User Type: Funded Program User', and 'Funded Program: Mayberry Resource Center'. A 'HELP!' icon is visible in the bottom right corner.

**FIRST5 CALIFORNIA**  
Statewide Data Collection and Evaluation

**Main Menu**

**Proposition 10**  
Evaluation Data System

[Data Entry](#) [Reports](#) [Data Collection](#) [Narratives](#) [Program Setup](#) [User Type Selection](#)

**Participant Data**

- Direct Service Contacts by Demographics
- Nonduplicated Participant Counts
- Counts of Participants (Some Duplication)
- Nonduplicated Participant Count by Service
- Participant Detail Data Export (Individual)

**Outcome Data (Core)**

- Intake Report
- Intake / Follow-up Report
- Pivot Table Report
- Intake/Follow-up Due Report
- Intake / Follow-up Schedule


**Progress and Fiscal Reports**

- Funds Spent by Strategy
- Achievement Milestones


**Service Quality Reports**


- Intensity of Services
- Duration of Services
- Comprehensiveness of Services

**Special Needs**



User: sanders.mary (0 login attempts since 11/3/2005 2:31:10 PM)  
User Type: Funded Program User  
Funded Program: Mayberry Resource Center



 Trusted sites



# Individual and Family Direct Service Data

## Summary of data entry

### To Add Individual and Family Direct Service Data

- Click **Search** on the Main Menu.
- Select participant from the participant browser.
- Click **Service Details**.
- Enter the service detail information.
- Select **Copy Service Details** checkbox to copy service information to a family member (optional), click **Next**.
- Enter the **activity information**, click **Next**.
- Enter **Notes** (optional), click **Save**.

### To Edit

- Select entry to be edited.
- Make necessary changes to Modality Information screen, click **Next**.
- Make necessary changes to Activity Information screen, click **Next**.
- Enter the necessary changes to Notes (optional), click **Save**.

### To Delete

- Select entry to be deleted.
- Click **Delete**.
- Click **OK** to acknowledge deletion.
- Click **OK** to confirm deletion.